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ABSTRACT

This paper discusses performance measurement in the Blake Dawson Waldron (BDW) law firm, a partnership with five offices in Australia, as well as a number overseas. Three levels of performance measurement are described: (1) personal level--through annual performance appraisals; (2) team level--the annual team meeting; and (3) service level--regular surveys and focus group meetings. Graphs present customer satisfaction survey results related to the library's importance, performance, and overall service delivery. Other ways that the library seeks continuous feedback are also summarized, e.g., librarian attendance at weekly meetings of lawyers, an e-mail newsletter, evaluation of training sessions, and client comments. The questionnaire used for evaluation of library training is appended. (MES)

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The Bottom Line: Performance Measurement in a Corporate Library

By: Moyra McAllister

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Proceedings

The Bottom Line: Performance Measurement in a Corporate Library

Moyra McAllister

"Outputs do not guarantee outcomes"
Osborne and Gaebler (1992)

In some ways the measurement of performance in a corporate library is simple. If the library does not contribute to the overall performance of the company then it will not survive. The library cannot be simply a "show piece" - it must be an essential part of the organisation.

To put it bluntly, companies exist to make money for their shareholders, or in the case of law firms, for the Partners, and this fact must be in the mind of everyone who works in a commercial environment.

Recent literature on performance measurement is moving away from the quantitative approach of counting processes such as reference questions answered (D'Avigdor 1997) to one of measuring performance against client expectations (Wilson 2000). There are also very apt reminders that performance measures and customer satisfaction surveys must be acted on and not simply regarded as 'report cards' (Cram 1997)

The environment

Blake Dawson Waldron (BDW), like most law firms, is a Partnership, which simply means that the Partners own the business. Thus support staff, such as librarians are working directly for the owners, and not as in many other commercial organisations, for a management which is answerable to shareholders, who can seem somewhat remote.

A good example of this is the budget process, where I am required to explain and defend my budget to a meeting of partners. The money that is spent on the Library comes directly out of their pockets. Because we are so close to our clients, feedback is immediate and can be sharp!

BDW has five offices in Australia, as well as a number overseas. There are 1600 staff of whom 750 are lawyers, including 200 partners. Since July 1999 the library has operated as a National service - prior to that date, although we co-operated fully, each office library had a separate budget, both for materials and staffing.

In August 1998 the management of BDW instituted a Review of Library Services, the aims of which were to identify ways of enhancing both

- **the service that the library provided to its lawyers nationally, and**
- **the cost-effectiveness of the service.**

A review team was selected consisting of myself and representatives of lawyers and support staff of different levels of experience.

Surveys were conducted in two offices to establish levels of satisfaction with the library service and to elicit suggestions for additional and enhanced services

The cost of each of the library services was also analysed, (referring to occupancy and staff costs as well as subscription costs) to establish whether out-sourcing or alternative methods of service delivery could provide a similar level of service for a smaller outlay.

The review team made a series of recommendations to be implemented over time. These included -

- **implement a national approach to charging for Legal Research;**

- centralise purchasing of Publications and Subscriptions within national Library Services to maximise volume discounts, reduce unnecessary duplication of material and to ensure that the Manager of Library Services approves any major items of expenditure ;
- re-organise the Library Services team to deliver a number of services from a single point nationally (different services will be delivered from different locations) and to nominate a person with single-point responsibility for delivering each service:
- for example
    - current awareness services
    - services to external clients
    - intranet development
- transfer the majority of Publications and Subscriptions and Library Staff costs to National Library Services

The review team did not recommend out-sourcing any of the library's services or functions.

It was as a response to this review that BDW National Library Services began formal operations in July 1999.

The Library team

There are 20 library staff (17 EFT) nationally, spread among the offices. A number of positions are "National". Apart from myself in Melbourne, there is the National Subscriptions Librarian based in Sydney and a National Training Librarian based in Brisbane. The other staff provide services to the offices in which they are located, with some having national responsibilities in addition to their local roles.

Performance measurement

Although we can produce statistics on number of Loans, journals circulated, reference queries answered etc. ,we do not consider these to be a relevant measure of our performance.

We approach performance measurement on three levels

- Personal level - through annual performance appraisals
- Team level - our annual team meeting
- Service level - regular surveys, focus group meetings There is an additional measure, called Legal III, which compares expenditures between major law firms, on this scale we are the most economical legal library service among the major law firms in Australia.

1. Personal performance appraisals

Annual performance appraisals are conducted using very generic competency profiles originally supplied by our Human Resources department. However, support groups such as the Library, Finance and Marketing are being encouraged to develop their own competencies and the library has just completed a first draft of this. This has been a rewarding experience as it has been necessary to examine carefully what we do and how it relates to the objectives of the firm.

Each employee is also expected to nominate personal goals for the year, which are checked in the following year's appraisal.

Performance appraisals are of little value if good performers cannot be rewarded and those less proficient encouraged and assisted to improve. (White 1999)

At BDW it is possible to reward good performance by salary increases and bonuses.

But, in addition to monetary rewards, BDW uses appraisals to identify training needs which are tied to personal goals and also to identified weak points. Each employee is expected to

spend 40 hrs per year in training, including seminars and conferences.

2. Annual team meeting

Each year, the Library service holds a two day meeting which all staff are expected to attend. This is held over a Friday and Saturday at a remote location where staff cannot be reached by work and we make arrangements

We employ an outside facilitator and with her assistance we review the goals we set at the previous team meeting and establish new ones. We plan a calendar of activity for the next 12 months. Also considered is how we are working as a team and what, if anything is hampering team development.

It should be stressed that this is not just an exercise for library management, all staff are included, even part time casuals and if possible, staff who may be on eg. maternity leave. All staff are expected to contribute to the discussions and constructive criticism is expected and welcomed.

This meeting is also seen as a 'reward' for the Library team's efforts in the past year. It is held at an attractive venue, with excellent accommodation, food, wine and sporting facilities. It is a cost to the firm which they are happy to contribute as long as the Library service continues to provide an excellent service.

3. Customer satisfaction surveys

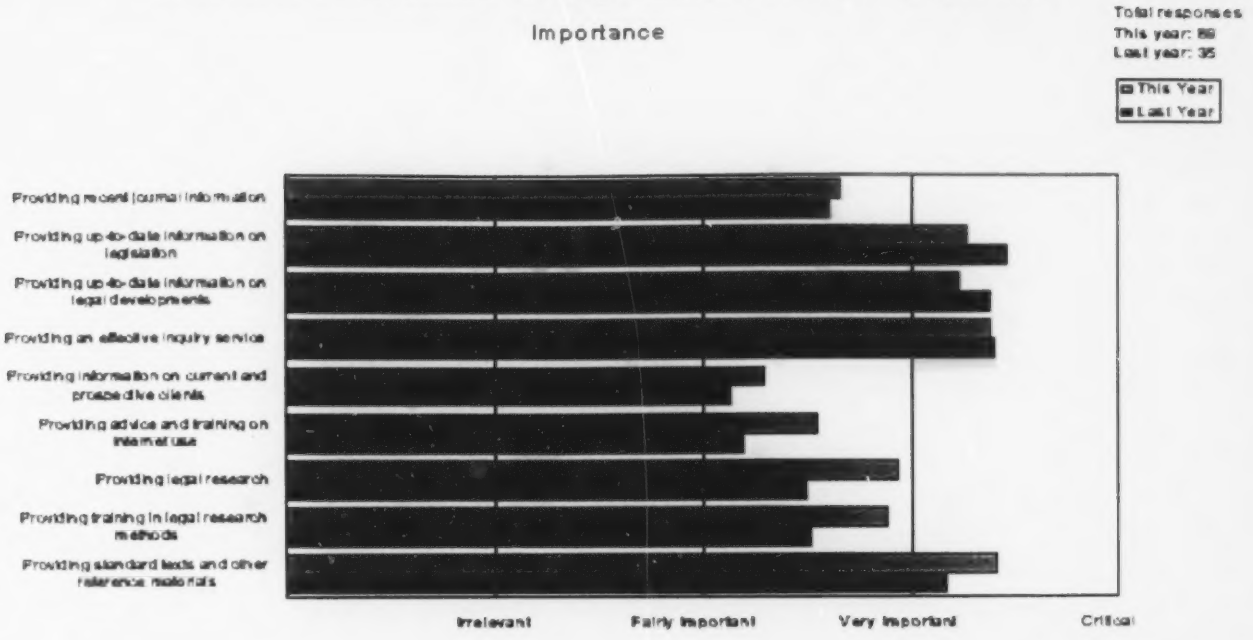
Since the review process regular surveys of customer satisfaction have been conducted in each office. These address three issues

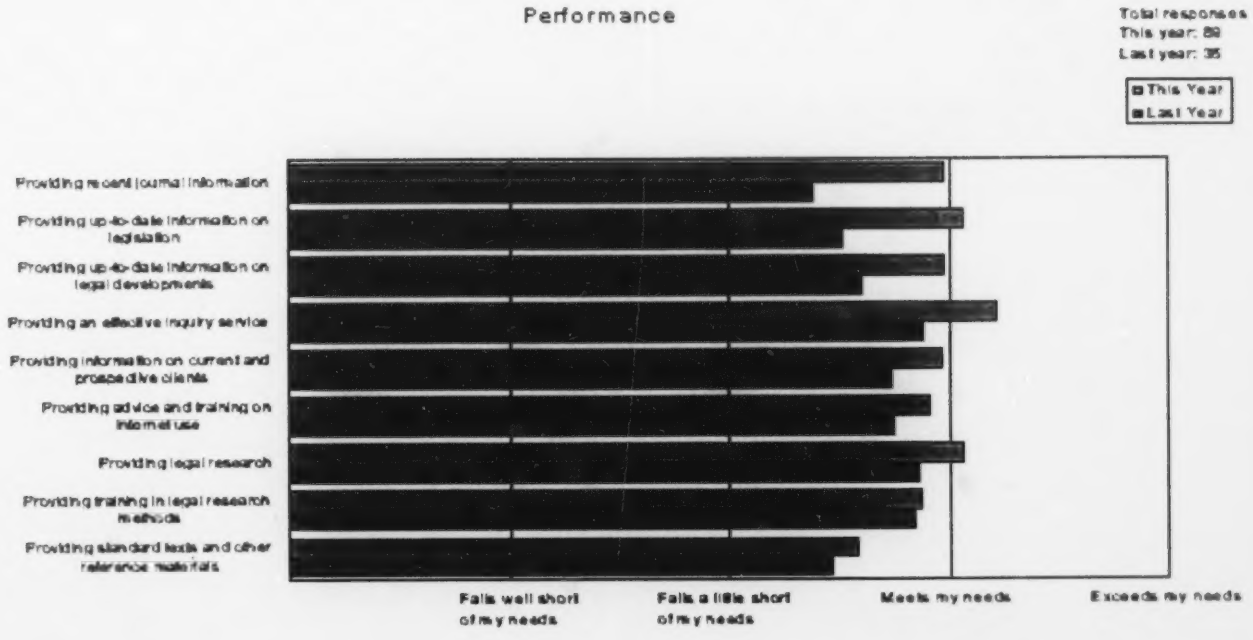
- **The importance of the services provided to the lawyers**
- **The performance of the service.**
- **Overall service delivery**

It is vital for the survival of the library that it does not provide an excellent service in areas that are regarded as unimportant!

The results of the 1999 survey for the Sydney Library are presented below

Customer Satisfaction Survey - Library Services (Sydney)




Performance
Total responses
This year: 89
Last year: 35
This Year
Last Year
Providing recent journal information
Providing up-to-date information on legislation
Providing up-to-date information on legal developments
Providing an effective inquiry service
Providing information on current and prospective clients
Providing advice and training on Internet use
Providing legal research
Providing training in legal research methods
Providing standard texts and other reference materials
Falls well short of my needs
Falls a little short of my needs
Meets my needs
Exceeds my needs

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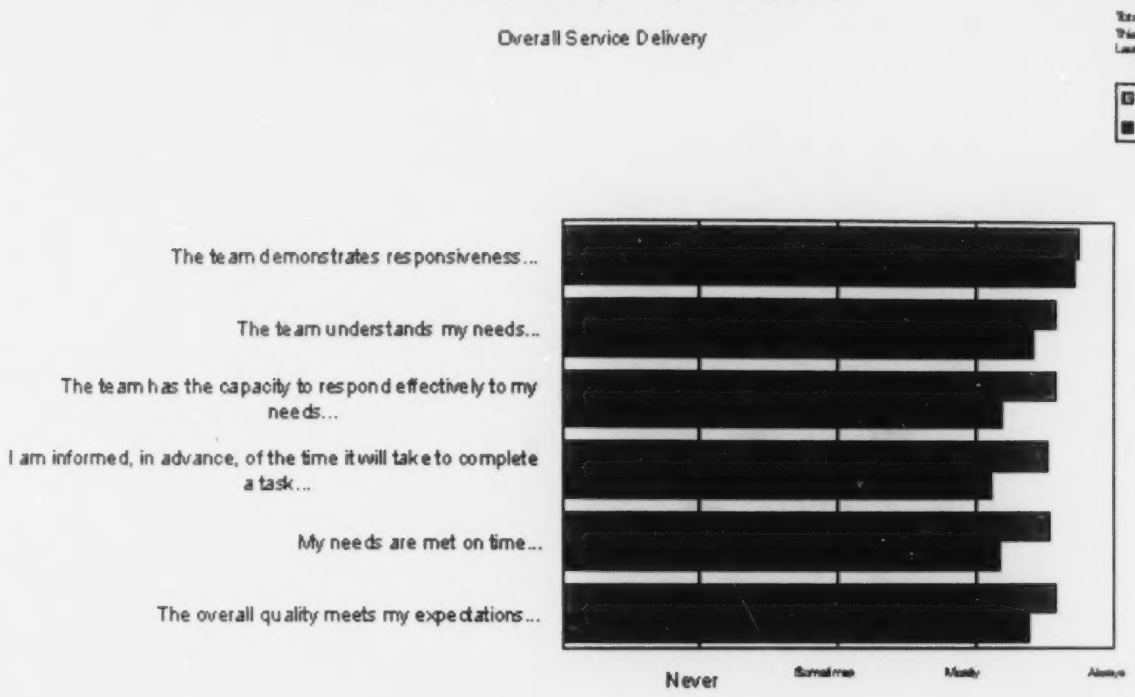
Customer Satisfaction Survey - Library Services (Sydney)
Overall Service Delivery
This Year
Last Year
The team demonstrates responsiveness...
The team understands my needs...
The team has the capacity to respond effectively to my needs...
I am informed, in advance, of the time it will take to complete a task...
My needs are met on time...
The overall quality meets my expectations...
Never

Three things are immediately obvious

- **We are not providing any services that are Irrelevant, which is good - but neither are we providing any that are seen as Critical and our future would more assured if we were!**
- **Response rate to the survey has improved greatly - showing that the lawyers are aware of the importance of providing feedback**
- **Our performance is improving**

[These are standard surveys conducted across all service areas and the library service is consistently ahead of all other departments]

In addition to "ticking the boxes" in the survey, participants were asked to add comments if they wished on both importance and performance. Most of the feedback was positive with comments such as "enthusiastic team", "service delivery is excellent". The few participants who had critical comments (and were willing to identify themselves) were asked to elaborate their concerns. These were sometimes the result of misunderstanding of the services, which is itself a criticism of our marketing strategies, but where constructive suggestions were offered these were implemented if possible and the lawyers kept informed of the progress.

While these surveys are valuable as a yearly scorecard of how our performance is seen by our clients, we continuously seek feedback in a number of ways

- **Library staff frequently attend weekly meetings of lawyers in specialist areas to explain new services, gather comment and ask for advice on what further services could be offered**
- **The library has a weekly e-mail newsletter to lawyers (L2L: Library to Lawyer)with descriptions of existing services, news of training sessions and handy research hints in addition to information on recent acquisitions - because this is e-mailed, feedback is as easy as hitting and many of our clients take advantage of this to comment on items**

- **Library managers in each office attend the monthly meetings of Senior Partners to explain library policy, expenditure and staffing issues - again feedback is sought and acted upon**
- **Each training session is evaluated by those attending [Appendix A]**
- **Our clients do not hesitate to comment on our service and make suggestions for improvements at any time - we are seen as a friendly and approachable**

The Bottom Line

Quantitative performance measures and service level agreements may be still appropriate for Public and Academic Libraries, (although there are indications that this is no longer enough) but for corporate Libraries in commercial organisations, the only relevant measures are qualitative.

The best indicator to us that our performance is appreciated by our employers is the recent introduction of charging the firm's external clients for the research work performed by library staff. When this was first suggested it was thought that partners would not be willing to pass on such charges to their clients. However it is now recognised that the research abilities of the library staff are in many cases superior to those of the lawyers and we 'add value' to work done for these clients and in most cases these charges are passed on. We are indeed contributing to "the bottom line".

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APPENDIX A

Evaluation of Library Training

Session Date - _____Time - _____

1. What were the two best things about the session?

2. What were the two worst things about the session?

3. There was

a. too much content for the time
b. the right amount of content
c. too little content to be useful
Comments?

4. The exercises

a. helped me understand the product
b. made no difference
c. confused me
Comments?

5. The handouts

a. were too detailed - I'm unlikely to use them again
b. were a good aid - I will use them again
c. were not very helpful - I won't use them again
Comments?

6. The teaching style

6.1 the trainer was concerned about my learning experience
a. true
b. false

6.2 the trainer knew the topic well
a. true
b. false

6.3 the style of training was appropriate in this context
a. true
b. false

Comments?

7. Suggestions for improvement, other training sessions, etc. Use the back of the sheet if necessary.